Activities: Quick Tips on How to Complete

PolicyCenter

Description

The following are system-generated activities, based on actions in PolicyCenter. Many activities require some sort of action, even if only to select “Complete” and remove it from the “Activities” list. This job aid provides high-level steps on how to find, review, and reply or complete an activity.

Finding activities:

- All activities assigned to you – “My Activities” screen on the PolicyCenter Desktop
- All activities for an agency – The “Team” tab, select the “Activities” link on the left navigation bar
- Activities assigned for a specific policy - The “Policy Summary” screen under “Current Activities”
- Activity Email – Select the link in the email to go directly to the activity

Select the link to advance to the desired topic:

- Using the Agent Activity Reply Function
- Completing Activities
- Common Activity Types in PolicyCenter

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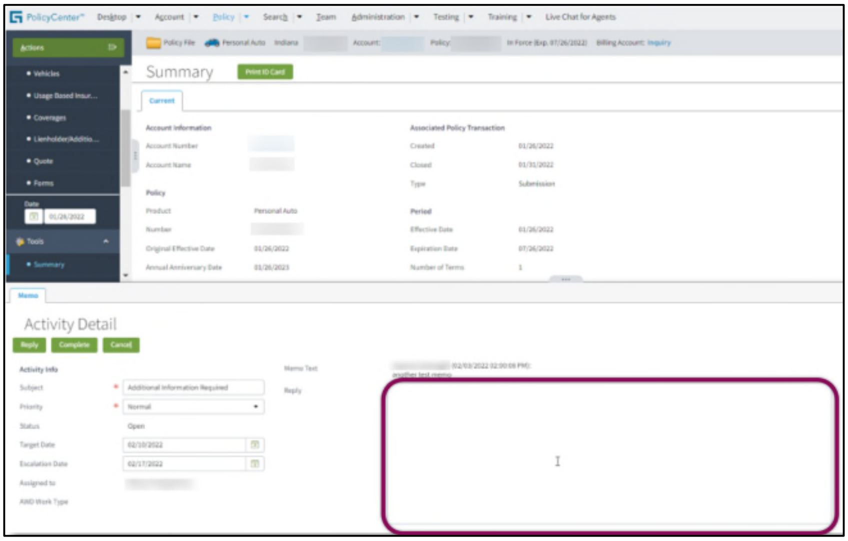
Using the Agent Activity Reply Function

Using the Agent Activity Reply function does three things:

- Adds your reply to the Activity text on the "Notes" screen
- Removes the activity line item from your Desktop screen. *You will not have to complete the "Completing Activities" section of this job aid.*
- Routes the memo back to the sending business unit where it can be worked per existing process.

Step 1

Action	Screen
After accessing the activity, the activity type allows a reply. • Enter text in the "Reply" textbox on the "Activity Detail" screen. **Important Note:** The "Reply" textbox is only active for the user to whom the activity is assigned.	

Step 2

Action	Screen
In the "Activity Detail" section: • Select the "Reply" button. **Important Note:** An error message will appear if the textbox is blank when you select the "Reply" button.	

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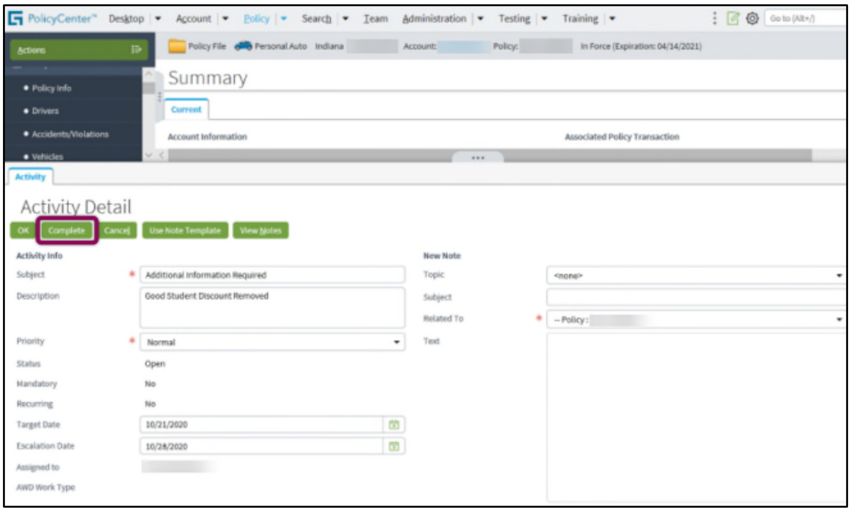
Completing Activities

Step 1

<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>After addressing any actions required by the Activity, and if a reply is not necessary:

• Select the “Complete” button to close and complete the Activity.</td><td>
</td></tr>
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Common Activity Types in PolicyCenter

The chart below provides tips on how to complete some common Activity types in PolicyCenter.

Activity Subject	Generated From	Required Action
"Same day transaction failure, complete it after 2 business days"	Attempting to issue more than one Policy Transaction on the same day for a policy	• Access PolicyCenter to complete the transactions in two (2) days. • Select "Complete" for the activity.
"Trailing Document Past Due: (XX)"	A trailing document has not been received after a few days	• Upload the company required trailing document (Document Vault or eSignature). • Select "Complete" for the activity.
"Verify Received Trailing Document: (XX)"	A completed trailing document has been received	• Confirm the received trailing document in Document Vault. • Select "Complete" for the activity.
"Account must be set up in the billing system"	After binding a new business submission; a reminder that the billing account must be set up	• Call Servicing (800-209-3288) to request billing account be set up. • Return to PolicyCenter and select "Complete" for the activity.
"Status is stuck on 'binding' for more than 24 hours"	After trying to bind a new business, a reminder that the policy has not bound and is not enforce	• Verify a billing account has been set up. If not, contact Servicing. • Once addressed, select "Complete" for the activity.
"Review open UW issues"	A pending transaction has underwriting issues, keeping the change from quoting to binding	• To open the activity, select the link in the "Subject" column. • Select the "View Notes" button. • If Underwriting doesn't require a response, select "Complete" for the activity and complete any processing in PolicyCenter. • If Underwriting approval is required, go to the "Underwriting screen and select "Request Approval".

Common Activity Types in PolicyCenter, continued

Activity Subject	Generated From	Required Action

"Underwriting has reviewed this policy"	Underwriting started a request for information or has completed a policy review.	• To open the activity, select the link in the "Subject" column.
		• Select the "View Notes" button.
		• If Underwriting doesn't require further information:
		  o Select the "Complete" button for the activity.
		  o Confirm that the policy is unlocked.
		  o Complete the transaction.
		• If Underwriting requires a response:
		  o Enter reply in the "Reply" textbox.
		  o Select the "Reply" button for the activity.

"Notice of Cancellation"	A policy has been flagged by Underwriting for Non-Renewal.
	
	This activity triggers up to 10 months in advance of the cancellation date.
	
	Policy Notes will remain after completing any activity.
		• Review the Notes on the Activity.
		• Select "Complete" to close the Activity.
		• Policy will cancel based on note.
		• If Underwriting requires a response:
		  o Enter reply in the "Reply" textbox.
		  o Select the Reply button for the activity.

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